College of Arts & Sciences Managers’ Meeting

Wednesday, June 9, 2021

10:30 a.m. – 12:00 p.m.

Recording

Welcome – Elizabeth Bakanic, Associate Dean, Finance & Budget Management

Beverly Wyrick, Director of Finance & Administration – Grad School

Aesha Greene, Senior Assistant Director – Scholarships and Student Aid

Presentation

Financial Aid – A project team was formed in 2019 to review student payments and they found inconsistencies and unclear policy. They identified a need for guidance on how to manage student payments and worked to create some goals to guide this project. The goals were to define and document student payment information, ensure the University is compliant with state and federal policies, correct known errors and communicate these changes to campus and students. Federal financial aid regulations define any money paid to a student for enrollment or education related expenses as financial aid. The University is required to report any financial aid and has agreed to have systems in place to capture any resources provided to students that is eligible as financial aid. All money paid to students is financial aid except for work performed, reimbursement of travel expenses on behalf of UNC and reimbursement of non-academic related expenses. All aid paid to students must be coordinated with other aid to prevent over award, which would put the University out of compliance. Over award means the total aid received is higher than the cost of attendance or the need-based aid received is higher than the documented financial need.

Training Grants – As of August 2021, training grant payments will be entered in GradStar and no longer paid from accounts payable campus vouchers. These payments will be made on a semester basis and will be processes like all other financial aid. Finance staff will no longer use accounts payable to make training grant payments so departments will need to evaluate who needs access and think about staff assignments and workload. Finance staff will need access to GradStar and be trained, along with student services
on how to process grants. The process for access is normal, departments can also contact gradstar@unc.edu to coordinate access.

**Student Impacts** – Students on training grants will be paid once per semester. Students paid on a semester basis will need to budget for the semester and educational resources will be provided to help with this transition. Financial Aid is reported on Form 1098-T and this form helps students determine if they can claim a tax deduction or tax credit. Federal aid eligibility can be reduced for students receiving departmental aid. Training grant payments will no longer be reported as taxable income on Form 1099-M or W2. Communication was sent to all students May 24th, 2021, with a copy to faculty and staff. A town hall was held on June 9th, 2021, hosted by the Graduate School and the Graduate and Professional Student Government.

**GradStar System Changes** – A new comment box has been added, the chart fields have been rearranged to match finance layout, “other acct info” has been renamed to “additional CFS”, award description length has been increased, an “include” checkbox on award row for instate/GSHIP proration has been added. New changes coming August 2021 will include non-service award type no longer being an option and new and more descriptive award types were created and added. Instate Tuition and GSHIP Proration now have required HR stipends and Training stipends, and optional fellowship/scholarship and research internship. A new Instate Tuition budget with similar functionality as tuition remission budget. Saves of instate award will be prevented if department is over budget. Instate budgets are provided bases on academic unit of the student. The academic unit of the student should plan to pay the instate tuition for eligible students if another department hires the student. New account codes for new award types have been added. For any adjustments that need to be made to instate budget, contact the Graduate School. The process for access is normal, departments can also contact gradstar@unc.edu to coordinate access.

**Return to Campus Update** – CAS Return to Campus Working Group

Kate Henz – There is still some discussion about where the budget is going to reside for the instate tuition.

Business needs will have to drive the decision-making process on how offices will work moving forward into the summer and fall. Departments also must recognize and understand the challenges of meeting the Community Standards while also being back on campus. Please check the CarolinaTogether website for changes to the standards. Academic departments are planning for students to be in classrooms at pre-Covid capacity with masks on. For many
departments, masks and some social distancing might not be possible. This will determine the plan moving forward. From the perspective of Dean Rhodes and Senior Associate Dean Kate, the main goals are to keep staff safe and follow the Community Standard guidelines and making sure business needs drive decision making for return to campus.

Ashante Diallo – An email was sent out from Central HR to Dean Rhodes asking for any departments considering to be a part of a pilot program from July 19th to the end of December 2021. The details of the Pilot are not yet known fully. The provost has communicated to the Dean and the working group that departments which had pre-pandemic flexibility will continue to have these permissions. The plan is to work on a what will be allowed for departments moving forward. Right now, leadership is comfortable with a plan that has about 50% of staff in the office meeting business needs. Any departments that want to deviate from this and have less staff on-site will need to provide leadership with a better understanding of the plan and how business needs will be met. The goal is to meet the needs and to be equitable to all staff. A survey was sent on June 6th, 2021, please take time to fill it out and reach out to your HR consultant with any questions. The plans that are received back from the survey will be looked at and discussed and should there be a need for review or additional edits, the HR team will work on that with each department. Any plans that are deemed pilot worthy will be brought to the Dean. CASBO is here to provide any assistance to the department to help meet their business needs and all the stakeholders, students, partners are happy.

Kate Henz – For any academic and student facing departments, it will take a very high bar for OHR to accept that department into their pilot program. Please use the survey to let CASBO know how business needs will be met. The current 50% threshold for on-site staff may need to be adjusted based on responses and how Dean Rhodes feels. There cannot be issues during the semester where the department is unable to meet student needs.

Ashante Diallo – Departments are asked to communicate with CASBO rather than central office as plans are being developed.

Kate Henz – There is already existing flexibility in the existing telework policy, so much of the return to campus plan can fit within these guidelines.

Ashante Diallo – The survey is incredibly important to determine each department’s situation and how we can best provide any assistance needed. Add any notes on what is going on in the building, how many staff will be onsite, etc. Once all the plans have been submitted, CASBO will work with
departments to put a plan in place with about 30 days to spare before the Return to Campus deadline. Plans should be only for the fall, not two separate plans for the end of summer and the fall, but there will be some flexibility granted to any departments needing it between July 19th and the start of the academic year.

**Finance Updates** – Elizabeth Bakanic, Associate Dean, Finance & Budget Management

Trust funds deficits must be cleared as soon as possible. Please look out from messages from the Budget Analysts regarding trust deficits in your area that need to be cleared out.

The deadline for ePars needing OSR approval is June 10th, so any ePars submitted after that may not be approved before the end of the year.

**HR Updates** – Ashante Diallo, Associate Dean, Human Resources

Carolina talent performances for SHRA employees are currently in process. Reports will be coming out soon. The new 20-21 goal plans were due, please reach out with any questions.

Training for the EHRA non-faculty process is being rolled out. This is for those who are ending their performance cycle at the end of July. New performance goals will be due mid-August and the cycle for HR on faculty will be changing shortly. Reminder that for faculty leaves, departments will have to complete a leave notification form and get it signed.

For any actions and especially those that impact pay, please submit those as soon as possible. There will be a new RASR process for this coming soon. The pre-approval process is still going on. There is a new CASBO HR preapproval request form that form could be used for both the essential form and the non-faculty position authorization form. Please consult the CASBO website for I-9 dates.

Ashante Diallo: For those departments, who have a faculty Member who was entering phase retirement, we need to get them a new appointment letter. Please help get the new appointment letter signed so CASBO can get it back to departments dealing with internal facing retirement.

**Next Meeting:**
Wednesday, July 14, 2021
10:30 a.m. – 12:00 p.m.
Via Zoom